

CAPABILITIES

Probate / Will Contest Litigation

The lawyers of MDJW have been involved in some of the highest profile contested estate matters in recent Texas history. Practice leader Dale Jefferson has been called upon by trustees, executors and other fiduciaries, who seek to uphold valid estate plans and testamentary documents, to represent them throughout the State of Texas. Additionally, Mr. Jefferson frequently represents the interests of legal and financial professionals as well as beneficiaries in contested estate and trust matters. Mr. Jefferson has litigated or tried to verdict cases involving will contests, undue influence, lack of testamentary capacity and breach of fiduciary duties. He has also assisted fiduciaries in winding down the business and financial affairs of decedents with complex estate matters. Mr. Jefferson also mediates probate and trust cases.

Among other notable cases, Mr. Jefferson represented the family trustee in the original J. Howard Martial estate litigation. Mr. Jefferson was co-lead trial counsel in the B. K. Johnson estate litigation in Bexar County. A successful verdict for Mr. Jefferson's client was attained after a three-and-a-half-month trial. Mr. Jefferson was also lead litigation counsel for the estate of legendary lawyer, John O'Quinn. Mr. Jefferson represented the executor, as lead counsel, in over 52 contested disputes. Those disputes included a claim for half the estate by a putative common law spouse, claims against the decedent's \$125,000,000 car collection and a suit seeking removal of the executor. Mr. Jefferson garnered several summary judgements and successful jury and arbitration trial verdicts for the O'Quinn Estate. Mr. Jefferson has been a frequent CLE speaker at both the advanced probate seminar as well as the advanced fiduciary law seminar sponsored by the state bar of Texas. In 2019, Mr. Jefferson was awarded by the State Bar of Texas with the Joseph S. Horrigan Award for Fiduciary Excellence. Mr. Jefferson was presented the award at the Advanced Fiduciary Law Institute.

Practice Contact

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